Part 4. Adoption

Part 1. Core Elements
Part 2. Metrics
Part 3. Onboarding
Part 4. Adoption
Part 5. Expansion
Part 6. Core Skills

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The 3 Goals of the Operating Model for Recurring Revenue:

- **Goal 1.** Establish a common, and customer centric, language.
- **Goal 2.** Apply standardized metrics to allow for benchmarking.
- **Goal 3.** Create Interoperability between different functions.

It is based on the following steps:

- **Step 1.** Use of the bowtie to model the entire customer journey.
- **Step 2.** Split up the customer journey in phases.
- **Step 3.** Establish key metrics for each phase [M, CR, PM].
- **Step 4.** Identify a handful of Moments that Matter per phase.
- **Step 5.** Create a Blueprint for each of these moments.
- **Step 6.** Codify SPICED into a Blueprint so it can be trained, improved, etc..
- **Step 7.** Measure metrics [M, CR, PM] and improve over time

The key functions are:

1. Lead Generation
2. Lead Development
3. Sales
4. Onboarding
5. Adoption
6. Expansion
Customer Success Operating Model

Introduction

The location of where you are at:
- The CS Operating Model
- In the Onboarding Playbook
- Handoff to Customer Success
- Blueprint 01
- Large numbering allows you to navigate easily in the slide sorter.

CS Operating Model - Onboarding Phase

Handoff to CS

Effectively transfer critical account information.

A smooth and effective customer handoff from the Sales team to the Onboarding and CS team is critical. It helps the customer experience and, ultimately, your business outcomes.

Ensure Sales teams are accountable for completing detailed handoffs to the Onboarding and CS team before they move on from the account. Best practices for good handoffs include:
- Complete the handoff as close to commit as possible while the information is still fresh.
- Transfer critical account info using SPICED™ including crucial details about topics like org, structure, persons, and red flags.
- Use clear handoff guidelines to ensure all team members know:
  - Who bought from us?
  - Why did they buy?
  - What were they doing before?
  - Why was that not working for them?
  - What was the problem to solve or avoid?

The goal of each blueprint is clearly stated upfront.

During or immediately after the handoff meeting, shall a Joint Impact Plan be completed with the Customer during the Kickoff.

Expertise broken down into a series of steps, actions, best practices etc.

Visual that guides you through the experience as a function of customer engagement over time.

The banner provides a visual cue to actions that are identified as a moment that matters.

Reference to the next action and blueprint in the customer journey.

Presence of SPICED, the framework which creates interoperability between blueprints.
The Adoption Phase of the customer journey is where your customers will spend most of their time. It’s critical during this phase to set up a proactive meeting cadence appropriate to the size of the customer and to establish ways to surface risks and opportunities as early as possible.

By establishing the following critical components as part of your Adoption Phase, you can ensure that teams are focused on delivering ongoing Impact efficiently and effectively.

There are five crucial actions part of the adoption process:

A1. Drive Impact Process
A2. Business Review
A3. Health Scoring
A4. Trigger Plays
A5. Renewal Execution

A proactive, repeatable approach to managing accounts will instill confidence in your customers, allow your team members to focus and prioritize, onboard new team members more quickly, and support scalability and positive business outcomes.
The goal of a Recurring Revenue service is to provide customers with recurring Impact. The Impact will not happen by itself. Three loops form the Impact Engine:

1. **The Impact loop** drives recurring Impact based on proven impact programs.
2. **The Activity loop** is where activities take place that result in Impact.
3. **The Trigger loop** allows the surfacing of risks and opportunities in an account.

The Joint Impact Plan (JIP) orchestrates the various actions that drive the Impact. JIP uses SPICED across all actions to guide the proper conversation with the customer around Impact. This allows you to train all customer-facing roles on how to drive Impact by asking good questions, listening, tracking adoption, measuring engagement, and responding to emails and surveys, participating in events, etc.

Don't lose momentum. Have a plan in place to drive impact.
Impact Business Review

An Executive Business Review, or EBR, is a strategic meeting with Stakeholders focused on validating & updating the customer's goals, reviewing the Impact achieved and discussing any risks or opportunities in the account.

When asking for an executive's time, you must provide value. Use this blueprint to structure your EBR. Use storytelling and active listening to get the most out of the interaction while benefiting the executive.

An EBRs is much more than a summary of past operational meetings. An EBR should be used to align the impact you provide with the company’s strategic interest for the next 12 months.

The goal of this blueprint is to align the impact you provide with crucial initiatives within the corporation. These initiatives can often be found in the public domain.

3 ways to deliver more Impact:
- Remediation: better utilize already paid for capabilities.
- Upgrade: deliver new capabilities to current users.
- Expand: find new users to deliver similar capabilities.

Use a story about a customer who didn't achieve results but was able to change strategy and deliver business Impact.

Ask: if you had to renew today, would you?

End on time, setup for the next meeting (WAGONS.)

Create a 5 min summary to be used by a broader audience.

Use a relevant story to inspire growth and Impact.

Obtain a number of quotes of IRL impact over the past months.

 Validate critical account info and capture any updates.

Set up with an agenda and a clear goal.

ACE the call with an agenda and a clear goal.

Prepare impact stories relevant to the customer’s current experience.

Analyze if impact was achieved and set expectations for future impact.

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Obtain a number of quotes of IRL impact over the past months.

Validate critical account info and capture any updates.

Use a relevant story to inspire growth and Impact.

Identify new critical events, for the next 12 months.

Close

Follow-up

Maintain momentum by following up immediately.

Analyze if the (desired) impact was achieved and set expectations for future impact.

Prepare impact stories relevant to the customer’s current experience.

ACE the call with an agenda and a clear goal.

Set up with an agenda and a clear goal.

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Customer Success Operating Model

**Trigger Plays**

Trigger Plays allow teams to react quickly to common scenarios.

There will always be situations that take an account off the ideal customer path. Sometimes there are risks to a renewal and you have to mitigate to save the account. Sometimes an opportunity will surface that needs to be acted upon quickly.

There are some risks and opportunities that are common, and while you can't plan when they happen, you can prepare for when they do occur.

As a team you need to set Triggers for each of the most common Risks, and Opportunities following a *If This Then That* (IFTTT) format.

Example:

- **Trigger**: If the Champion leaves then..
- **Action 1**: Send out an introduction and schedule a discovery call with the person that replaces them. Provide insights on the impact offered over the past and next 12 months..
- **Action 2**: Follow your Champion and see where they are going to land, as it likely may become a new opportunity for your sales team to pursue.

The goal of this blueprint is to identify a risk to the account or surface an expansion opportunity. This allows you to set a trigger play to mitigate the situation or address the opportunity.

**Identify a Risk**
- Champion Change
- Account Gone Dark
- Drop in Usage
- M&A Event
- Etc.

**Surface an Opportunity**
- Over usage
- Team Growth
- Market Opportunity
- M&A Event
- Etc.

**Actions**

- **Proven action(s) against the trigger.**
- **Measure the impact of the actions taken.**
- **Record completed Trigger Plays as a pocket story using SPICED. This creates a reference for other team members.**

**Trigger Plays**

- **Onboarding**
- **Adoption**
- **Expansion**
Health Scoring is a great way to use patterns to highlight potential risks or opportunities for an account. While Health Scoring is not meant to be a diagnosis tool, it can highlight symptoms and help your teams know what accounts may need attention and where to look to get more information.

Health Scoring should be based on patterns unique to your product(s) and customers, and can be balanced between system indicators like a rise or fall in product usage, and qualitative indicators discovered through conversation.

When developing your score, it’s important to involve Leadership, Product & other teams to create a simple scoring method for the organization.

TIP: Start with a single metric for each pillar

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**PILLAR I.**
Are customers getting Impact?

- Is the service being used?
- Is the impact important?
- Is the impact 10x the price?

**PILLAR II.**
Are customers satisfied by the level of support they receive?

- Have there been any moments that mattered?
- Are execs involved in the EBR?
- What is the response time to critical issues?

**PILLAR III.**
How engaged are your customers with your product?

- Any critical events coming up?
- Health scoring is dynamic. Over time the health KPIs are expected to improve.

**PILLAR IV.**
Are all the core teams utilizing the product?

- What KPI do we influence?
- Number of support tickets/response time?

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**SATISFACTION**

**ENGAGEMENT**

**ADOPTION**

**DRIVE IMPACT**

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This goal of this blueprint is to show there are four leading indicators for health that can be measured. Based on these measurements, trigger plays can be designed to drive actions and impact.
Renewal is a strategic moment that presents lots of opportunities.

Many organizations approach renewals as an operational moment marked by paperwork and boxes ticked off. However, we encourage you to consider renewal as a strategic moment.

- If you have been delivering Impact consistently, exploring potential expansion opportunities is only natural, even more so this is an opportunity to expand the business.
- From a revenue perspective, adding just 3% annually to a customer contract will cause the LTV to compound year over year, contributing more to your revenue with each renewal. Here are a few reasons to add revenue:
  - Annual price increase.
  - True up floating users/usage.
  - Upsell new features.
  - Expand your network with the customer.

Start the process around six months ahead of the renewal date to provide time to develop an opportunity or mitigate any account risk.

This goal of this blueprint is to provide an outline of the actions involved in the renewal.

- Understand the customer's original needs and if those needs have changed.
- ACE the call with an agenda, and a goal.
- Time

- PREPARE
- SETUP
- IMPACT
- PAIN
- ITUATION
- SUMMARIZE
- SAVE
- STOR
- DECISION
- NEXT STEPS
- FOLLOW-UP
- DRIVE IMPACT
- CRITICAL EVENT

Maintain momentum by following up immediately.

Identify the Process, the Decision Criteria, and the Decision Maker associated with that KPI.

Use a relevant story about a customer who changed to achieve Impact.

Perform a play proven to have worked in the past in a similar situation.

Discuss new impact for the coming months.

Ask if this is important.

Demonstrate the *new* impact in context of their situation/pain.

If desired impact was not achieved, go back and determine the desired Impact for next year.

Did you achieve the impact? And are they still planning on using the same impact and to use you to achieve that?

Take notes of a specific situation and unique pains.

Confirm why they originally came to you.

Confirm if you got it right.

Do they plan on renewing? If no, what are the obstacles?

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